

*“opinionway* for **MSH**  
DiotSiaci Group

# International Mobility Policies in 2022

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# Background & Objectives





# Pandemic, geopolitical, ecological and economic challenges: what are their impact on companies' international mobility policies?

- ▶ In September 2020, and then in March 2021, MSH conducted two surveys to **measure the impact of COVID-19 on international mobility policies** of French and international companies.
- ▶ **The second wave of March 2021 highlighted, among other things, three key findings:**
  - ▶ **International mobility was kept by companies** despite the pandemic;
  - ▶ **Corporate social and societal responsibilities** towards employees were **strengthened**;
  - ▶ **Companies were increasingly paying attention to certain issues**, including the medical evacuation benefit as well as specific emergency plans.

**Beyond the challenge of the pandemic, MSH conducted a new survey to measure the impact of the geopolitical, ecological and economic issues on companies' international mobility policies in 2022.**



# A new wave of survey conducted to...

1

**Collect the prospects of large global companies for development of their international mobility policies**  
*(duration of international mobility programs, development of new forms of mobility, etc.)*



2

**Measure the impact of geopolitical, ecological, socioeconomic and pandemic challenges, etc. on the companies' international mobility policies**



This report presents the results of the third wave of survey conducted in September 2022.



# The new wave needs to be addressed with respect to learnings from the prior wave conducted in March 2021:

## Methodology used for the survey

**Telephone survey conducted from March 3 to 15, 2021 with 64 companies:**

### Population size:

- Less than 50 mobile employees: 22%
- Between 50 - 250 mobile employees: 36%
- More than 250 mobile employees: 42%

### Sector of activity:

- Manufacturing: 30%
- Oil & gas and energy industry: 13%
- Services to companies and communities: 12%
- International trade and distribution: 11%
- Consumer goods: 8%
- Engineering and construction: 8%
- Transportation, logistics: 6%
- Other: 13%

## Main findings of the survey conducted in March 2021

- ▶ **International mobility was kept despite the pandemic:**
  - ▶ 66% of companies **kept** (63%) or **increased** (3%) **their number of globally-mobile employees. However, keeping strong health and economic restrictions** could have an impact on international mobility for 50% of companies surveyed.
- ▶ **COVID-19 reinforced corporate social and societal responsibility:**
  - ▶ **59% of companies considered that COVID-19 had reinforced their CSR.**
- ▶ **Companies were increasingly paying attention to medical evacuation benefits and emergency plans for globally-mobile employees.**
  - ▶ **Half of companies** considered that the pandemic had forced them to **rethink their international mobility policies.**
  - ▶ While **medical evacuation benefits, strengthened communication on emergency plans, finding solutions to practical issues and even remote working** seemed to be **prerequisites to international mobility**, shorter stays on site or **commuting** were then rarely considered by companies.



# Methodology



# “ Survey methodology



**Quantitative study conducted by telephone** with a database of **clients** and **prospects**.

- 71 clients and 7 prospects were surveyed, i.e. **a sample of 78 respondents**.
- 65 interviews were conducted in French and 13 interviews in English.



The survey was conducted **by telephone using the CATI system** (Computer Assisted Telephone Interview) via a database of contacts supplied by MSH (175 contacts).



Interviews were conducted between **September 9 and 30, 2022**.



OpinionWay conducted this survey in accordance with **ISO 20252 standard procedures and rules**.



The results of this survey must be read taking into account the margins of error: up to 8 to 10 points for a sample of 80 respondents.



*Any partial or total publication must include the following full mention:*

**“OpinionWay survey for MSH”**

*and no part of this survey may be used without this title.*



# Profile of the sample

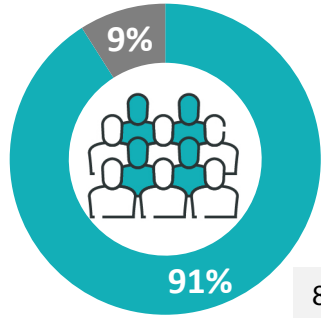






# Profile of the sample

Prospects 14% in 2021



Clients

86% in 2021

## Size of expatriate population



Less than 50 employees 23% 22% in 2021

Between 50-250 employees 32% 36% in 2021

More than 50 employees 45% 42% in 2021

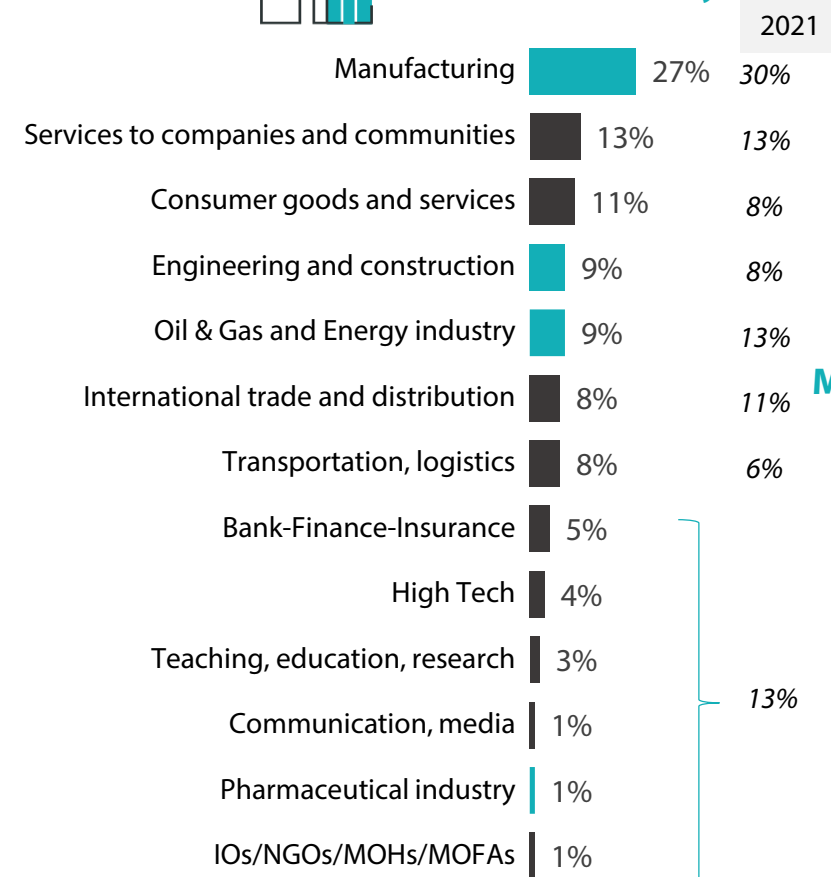


Total

78 respondents



## Sector of activity



Total Manufacturing 46%

Total Services 54%

**50%**  
had already responded to the survey in 2021



# Results





**A**

**A “positive context” that has led companies to develop their international mobility policies**



# After 2 years strongly impacted by the health crisis, 2022 has been promising for most companies with global operations



78 respondents

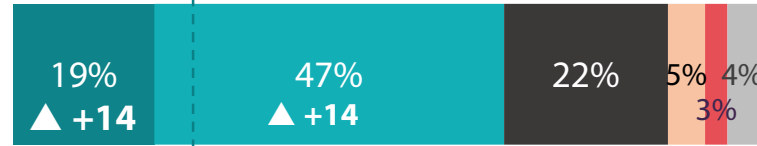
Q2. Compared with last year, would you say that in 2022 each of the following aspects: increased significantly, increased slightly, remained stable, decreased slightly, or decreased significantly?



2021 differential reminder



Your company's sector of activity



% increased or remained stable

88%

Differential Increased - Decreased

+58

+31



Total staff numbers, the number of employees in your company



88%

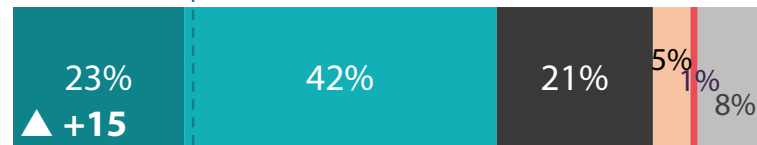
+13

+38

-1



The activity and turnover of your company



86%

+59

+38

● Increased significantly ● Increased slightly ● Remained stable ● Decreased slightly ● Decreased significantly ● Don't know

▲ ▼: significant change since March 2021

XX% / XX%:

Result is significantly less than or greater than total



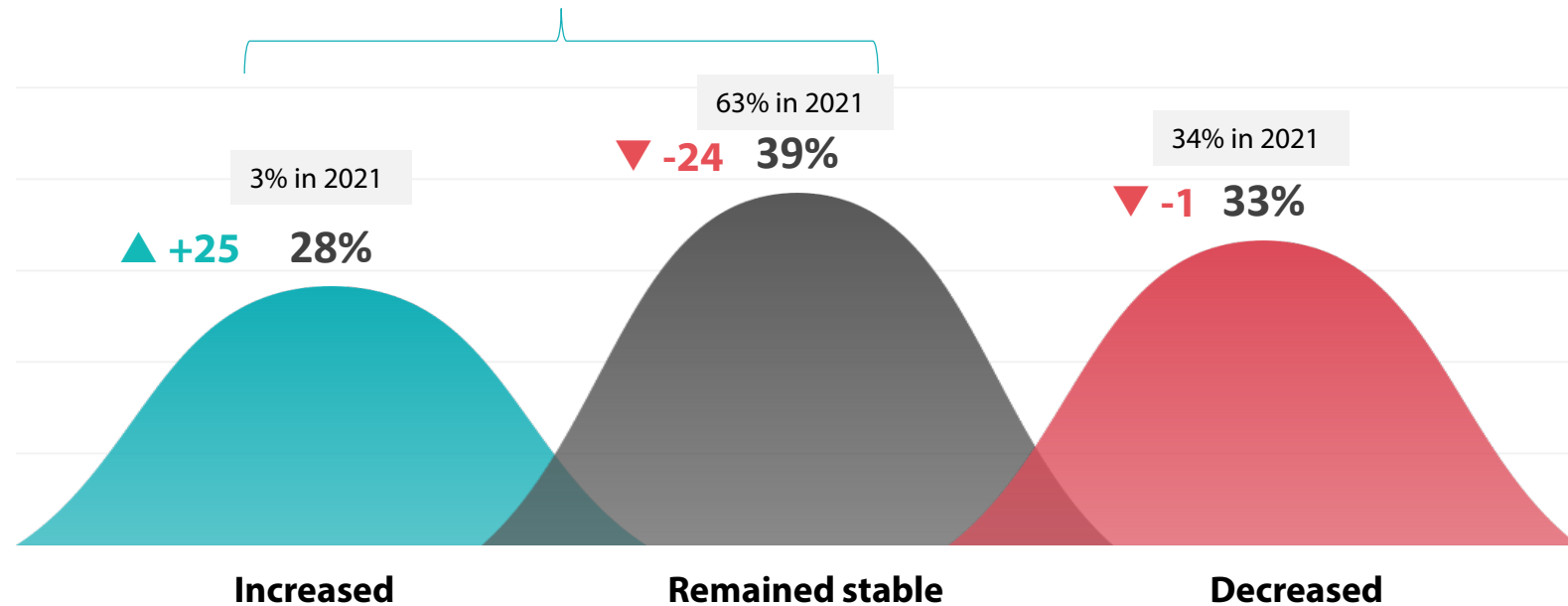
# The current context favors international mobility: more than 1/4 of companies surveyed increased their population of globally-mobile employees vs. only 3% in March 2021



78 respondents

Q3. In 2022, would you say that the total number of your globally-mobile employees has...

**67% have kept at the same level or increased their total population of globally-mobile employees**



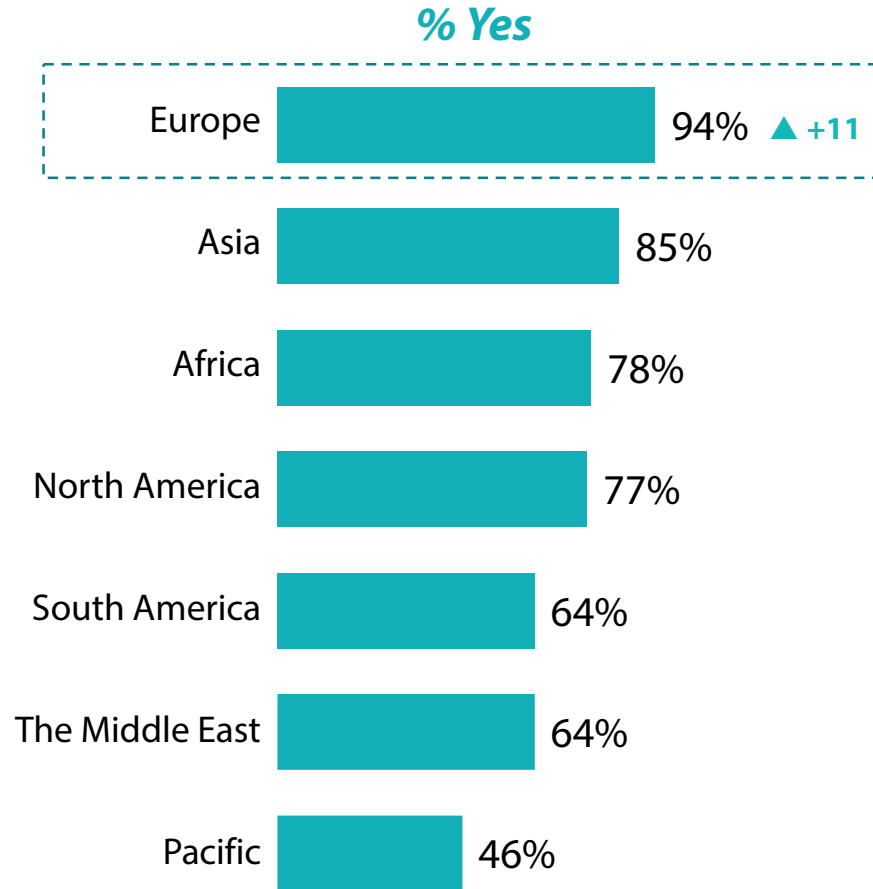


# Increase in the number of globally-mobile employees observed mainly in Europe



78 respondents

Q1. To begin with, can you tell me the continents where your company's globally-mobile employees are currently located? Do you have employees in:



Average  
**5.1**

150 or more expatriated employees: **5.8**

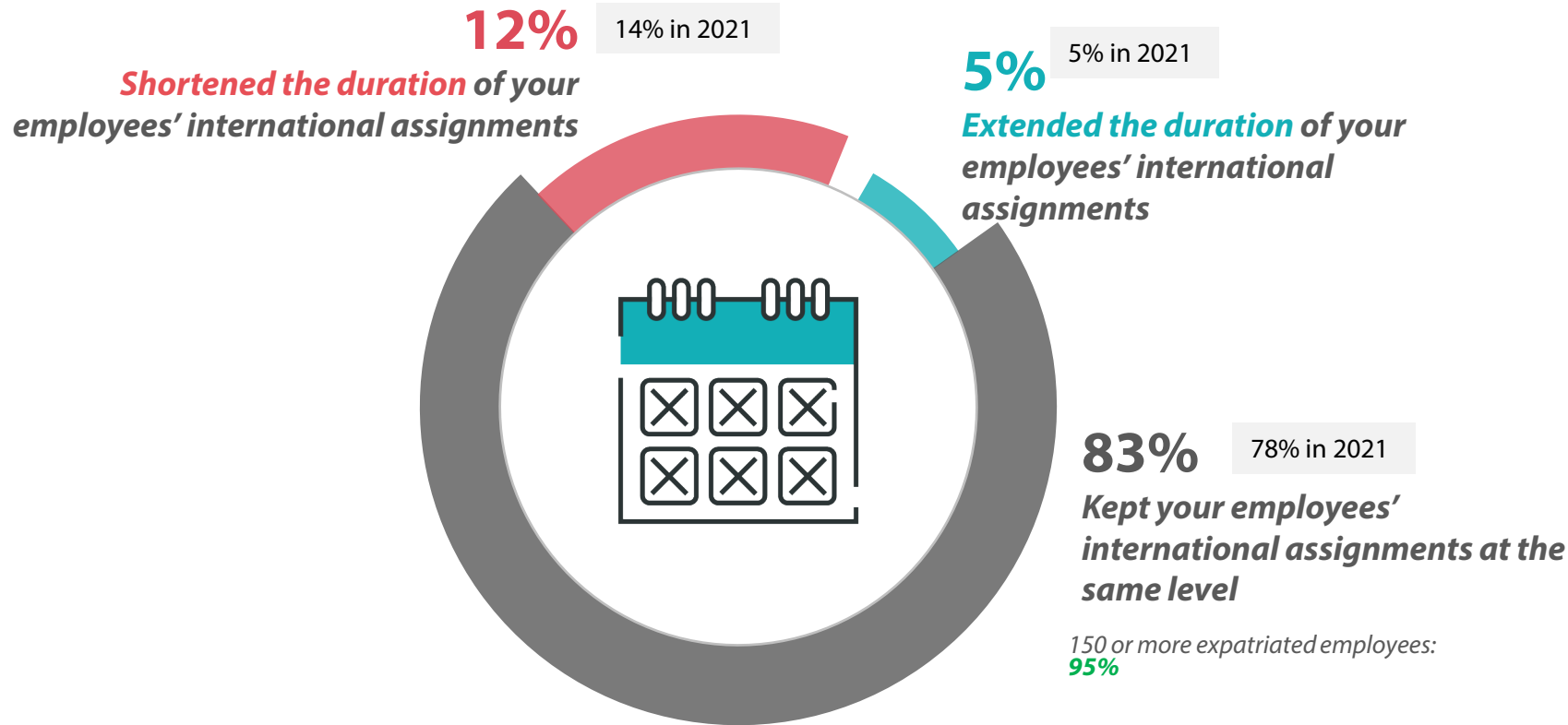


# Most companies have kept the duration of employees' international assignments at the same level; the score is stable compared to March 2021



78 respondents

Q4. In 2022, would you say that your company has...



150 or more expatriated employees: **95%**

**88% of companies have kept at the same level or extended the duration of international assignments for certain employees**

150 or more expatriated employees: **95%**



**B**

**In addition to the challenge of the pandemic, new issues have already had an impact on the international mobility policies of many companies**





# The pandemic remains a major challenge for international mobility, but new issues mainly related to human resources and new work organizations have become increasingly important.

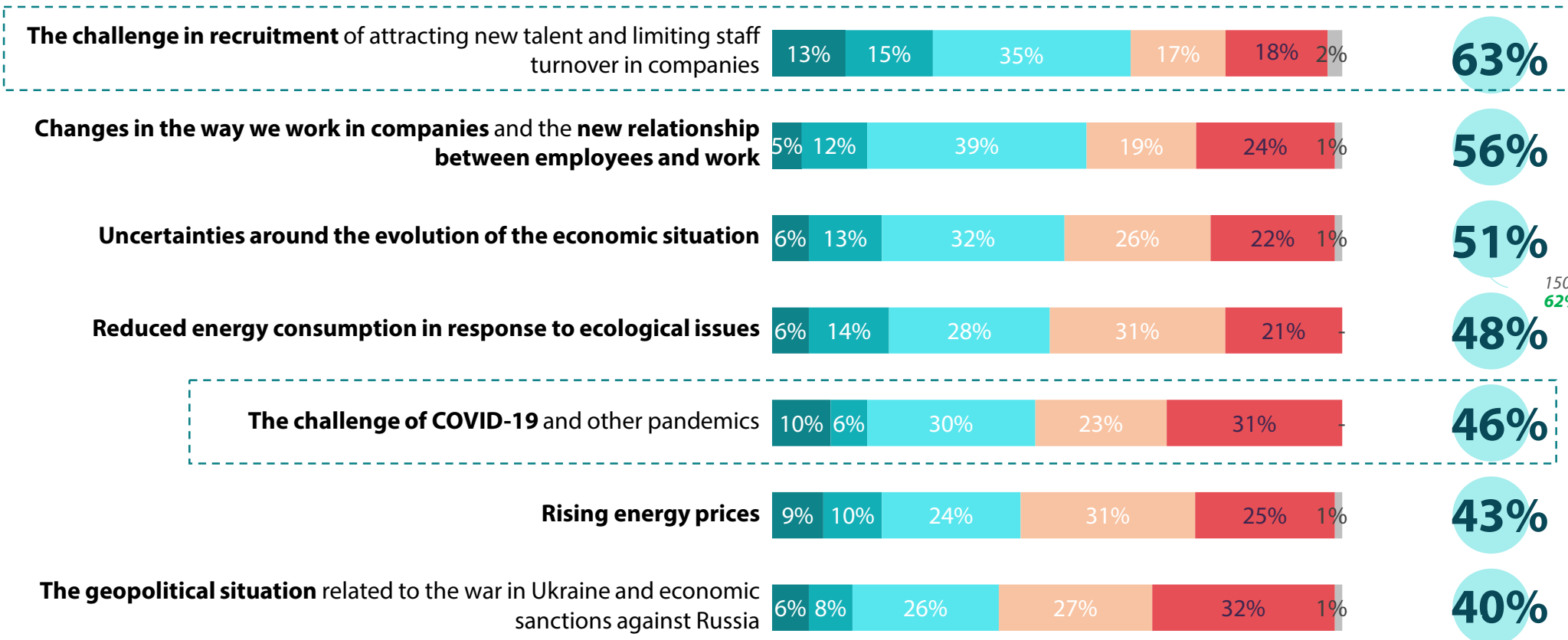


78 respondents

Q10. By the end of 2022 / beginning of 2023, do you think the challenges I'm about to list will have a major, very significant, fairly significant, fairly insignificant or not at all significant impact on your company's international mobility policy?

New question

% significant



150 or more expatriated employees: 62%

150 or more expatriated employees: 53%

Major Very significant Fairly significant Fairly insignificant Not at all significant Don't know



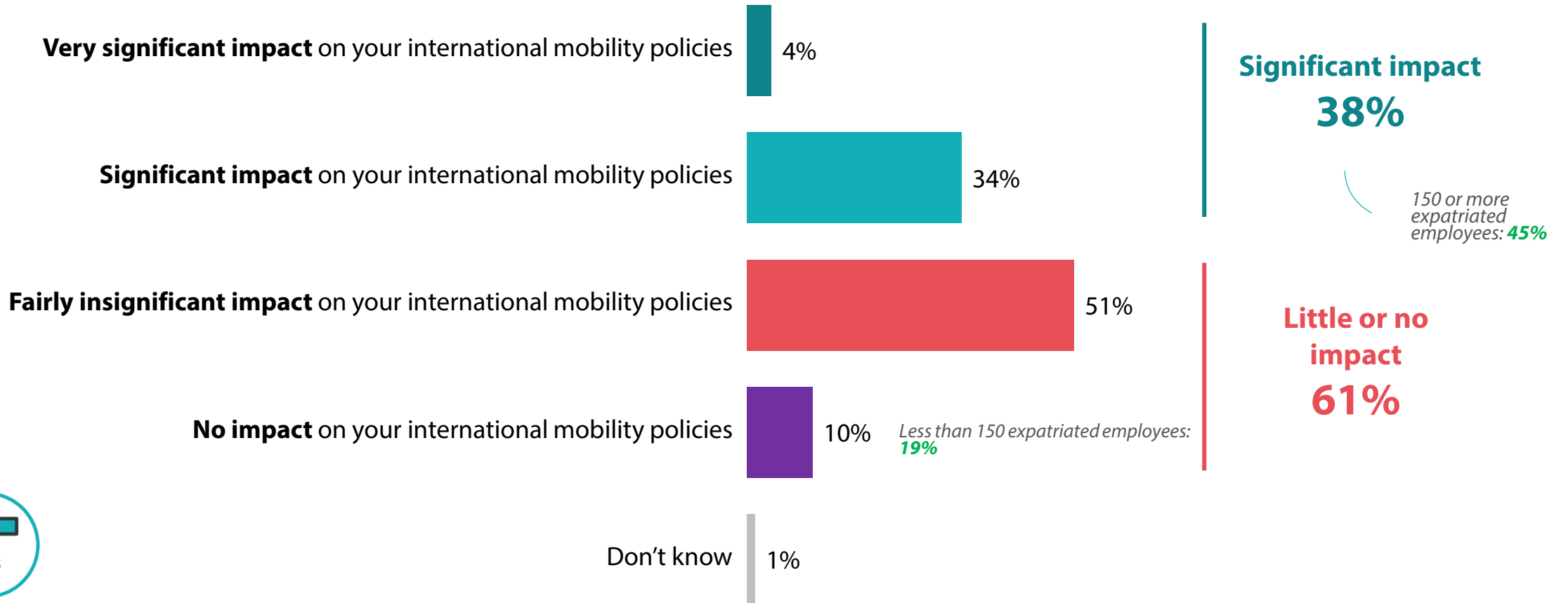
# Overall, the impact of these issues on international mobility policies is significant for 1/3 of companies, in particular for those with a large number of employees abroad



78 respondents

Q11. Overall, what do you think will be the cumulative impact of these 7 challenges on your international mobility policies?

New question





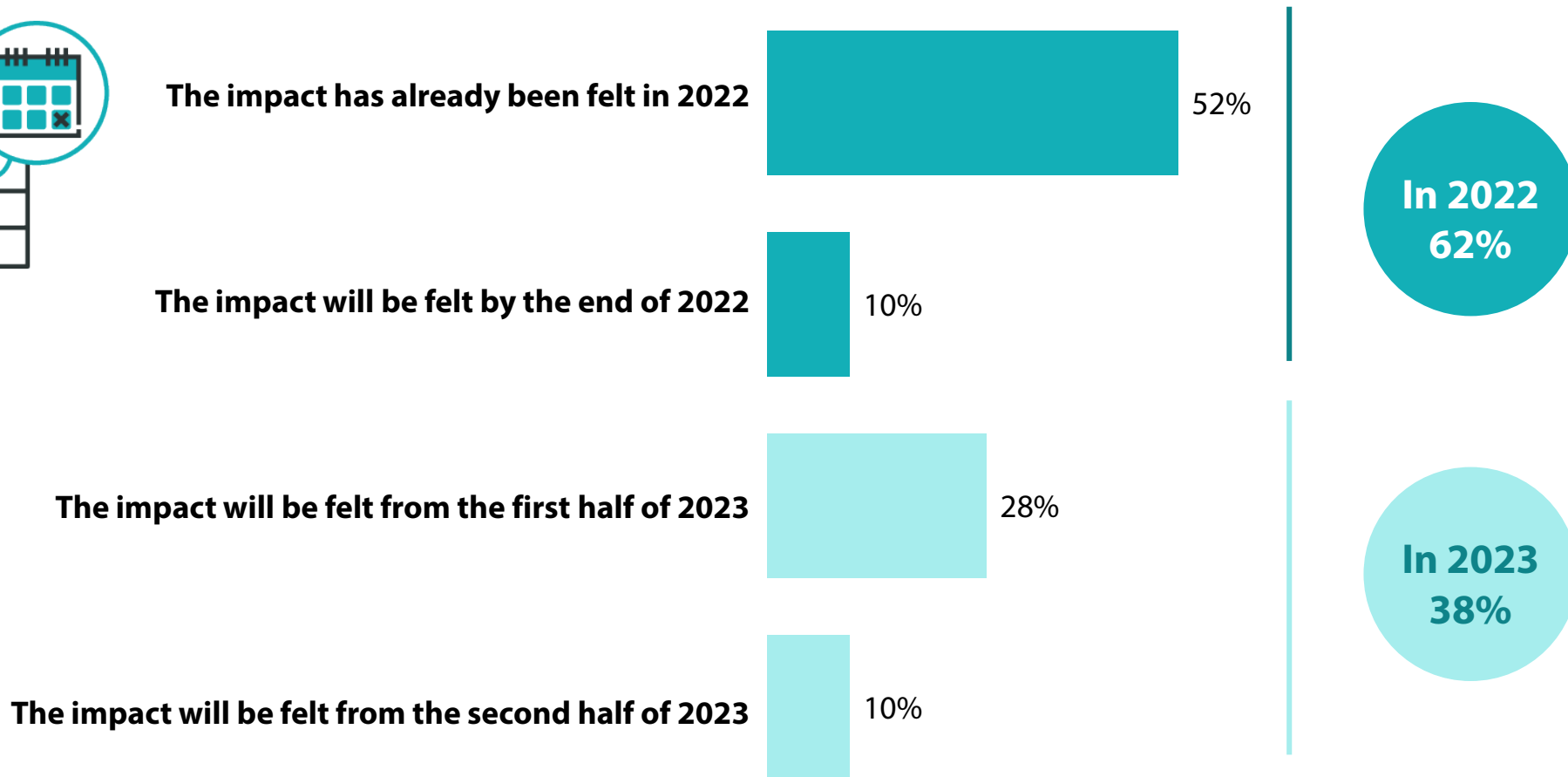
# Challenges that already had an impact or will have an impact in 2022 for a majority of companies which had to change their international mobility policies



29\* respondents

Q11a. How soon do you think these challenges will have an impact on your international mobility policies?

New question – question asked to companies whose impact of the 7 challenges on their international mobility policies was significant – *Important: small base\**



*\*Due to the small number of respondents, these results must be interpreted with caution*



# Companies are considering developing other forms of mobility, in particular short trips or rotational mobility and commuting, which emerged strongly in 2022

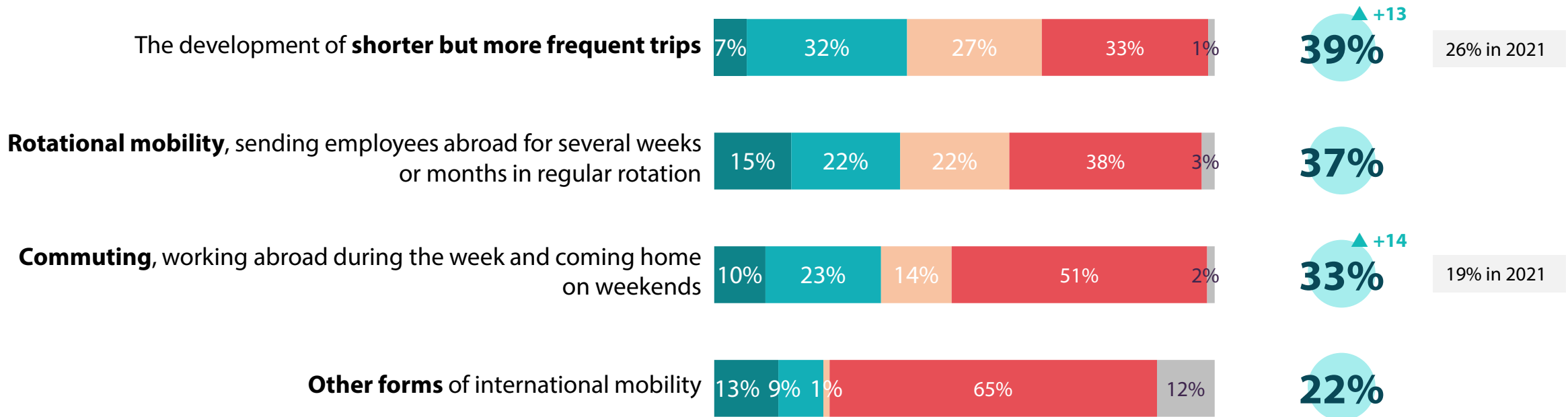


78 respondents

Q6. Given the new challenges facing companies, do you think that in the future the new forms of international mobility I'm about to list will develop a lot, quite a lot, not so much or not at all?

New question

% Will develop



● A lot ● Quite a lot ● Not so much ● Not at all ● Don't know ▲ ▼: significant change since March 2021



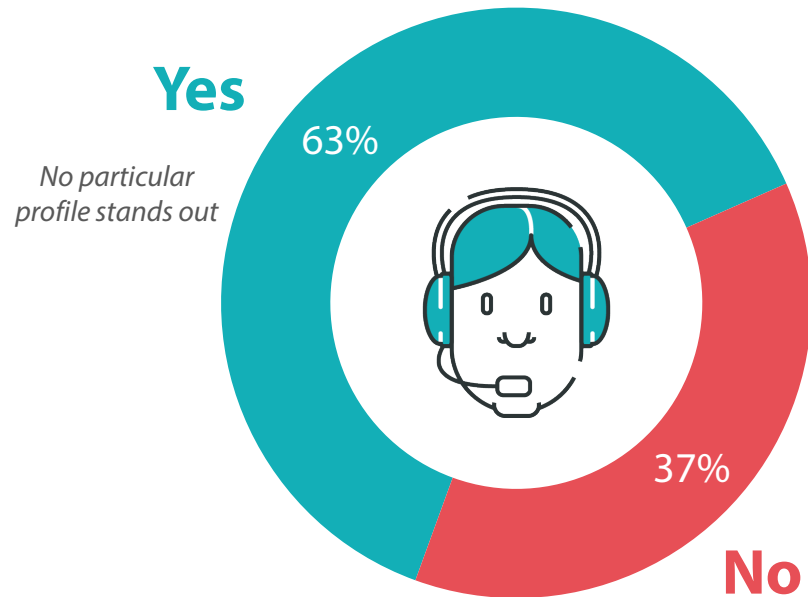
# International remote working: a type of mobility already implemented by 2/3 of companies



78 respondents

Q12. Is international remote working allowed in your company for employees whose role makes this an option? *New question*

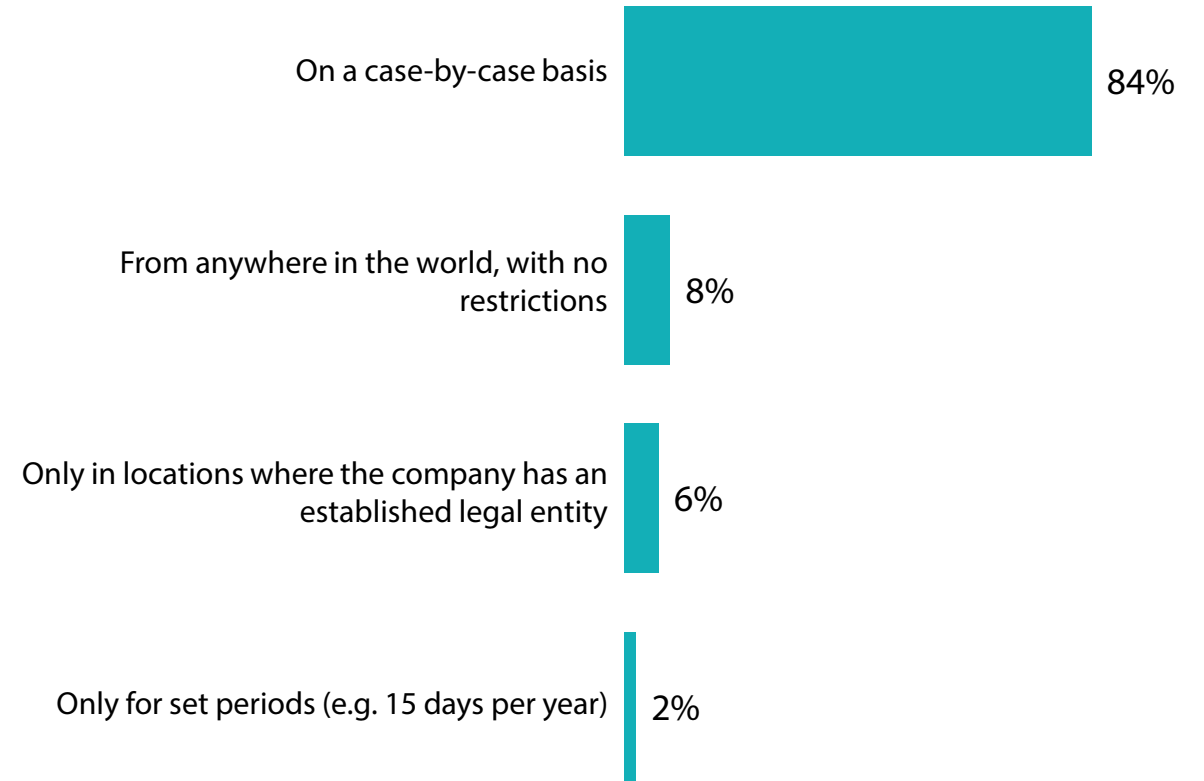
Base: 78



Q12a: Do you allow international remote working?

*Question asked only to companies that authorize remote work internationally*

*Base: 49 – important: small base*





# And half of companies surveyed are intending to develop international remote work...

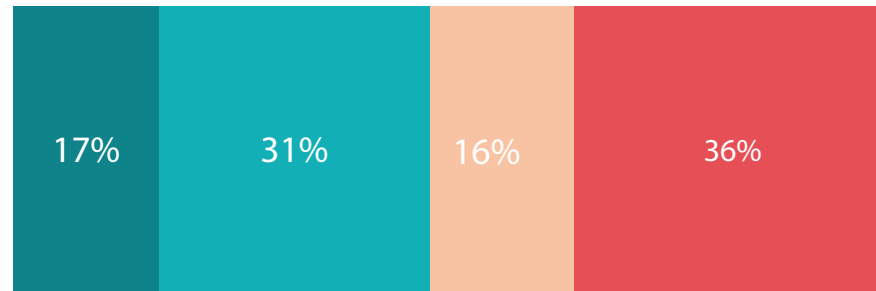


78 respondents

Q6. Given the new challenges facing companies, do you think that in the future the new forms of international mobility I'm about to list will develop a lot, quite a lot, not so much or not at all?

*New question*

**International remote working**  
(teleworking from another country)



**%**  
**Will develop**

**48%**

*No particular profile stands out*

● A lot   ● Quite a lot   ● Not so much   ● Not at all   ● Don't know



# Conclusions





## Main takeaways

- The **situation in 2022 has encouraged international mobility**: 25% of companies surveyed have increased their number of globally-mobile employees in 2022.
- **While the threat of the pandemic is still a major challenge** for companies in terms of international mobility (46%), **new issues that seem to be more important have appeared**:
  - The challenge in **recruitment** (63%)
  - The changes in **the way employees work** (56%)
  - **Uncertainties** concerning changes in the **economic situation** (51%)
  - **Reduced energy consumption** in response to ecological issues (48%).
- **New challenges whose overall impact on mobility policies seems significant for nearly 40% of companies**, in particular those with a large number of employees abroad.
- **The situation is leading companies to adapt and offer new forms of international mobility**, like **international remote working**, which has already been implemented by 63% of companies and will certainly continue to develop, similarly to new practices like **more frequent short trips, rotational mobility** and **commuting**.





**Let's answer all  
your questions!**





**Many thanks for  
your participation!**

